BlueTie DirectConnect User Manual

Version 1.00.0000

Table of Contents

Introduction 3
System Requirements 3
- Operating Systems 3
- Hardware 3
- Client Software (Outlook) 3

Installation 3
- Installer Notes 3
- Installation procedure 3
- First Time Transfer 6

Setup Wizard 7
- Authentication 7
- Conflict Resolution Settings 9
- Contact Manager Settings 10
- Calendar Settings 11
- Task Settings 12

System Tray DirectConnect Settings 14
- Authentication Tab 15
- Settings Tab 15
- Rules Tab 16

DirectConnect Updates 16
Outlook Client Updates 16
Field Mapping Information 17
- Tasks 17
- Limitations 17
- Contacts 18
- Display Name / File As 19
- Limitations 19
- Calendar 19
- Reminders 20

Additional Information 20
- Sales and General Information 20
- Customer Service and Technical Support 20

Introduction

DirectConnect is the first desktop application connector that gives you a real-time connection between BlueTie's back-end, BlueTie Server, and Outlook on the desktop. DirectConnect gives you a collaboration tool, plus an instant disaster recovery solution. If your Outlook data ever becomes corrupted, or if your computer ever fails, you will always have a secure version of your data stored on BlueTie Server.

System Requirements

Operating Systems

Supported on the following operating systems:

· Windows 2000

· Windows XP

Hardware

Personal computer with an Intel Pentium 233mhz or higher processor, Pentium III recommended.

Client Software (Outlook)

DirectConnect supports the following versions of Microsoft Outlook:

· Outlook 2000

· Outlook XP

· Outlook 2003

Installation

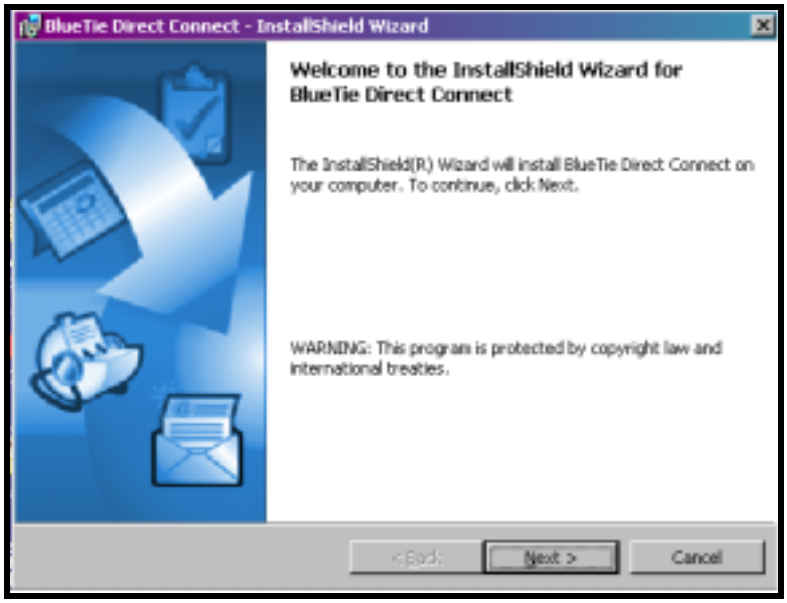
Installer Notes

The DirectConnect Installer is available at www.bluetie.com/support.asp website.

The installer will detect which version(s) of Microsoft© Outlook are available on your computer, and will prompt you to choose a version. Keep in mind, a version of Outlook must be selected before you can start the download. Note: if you have only one version of Outlook installed, you will not be prompted to choose a version.

Installation procedure

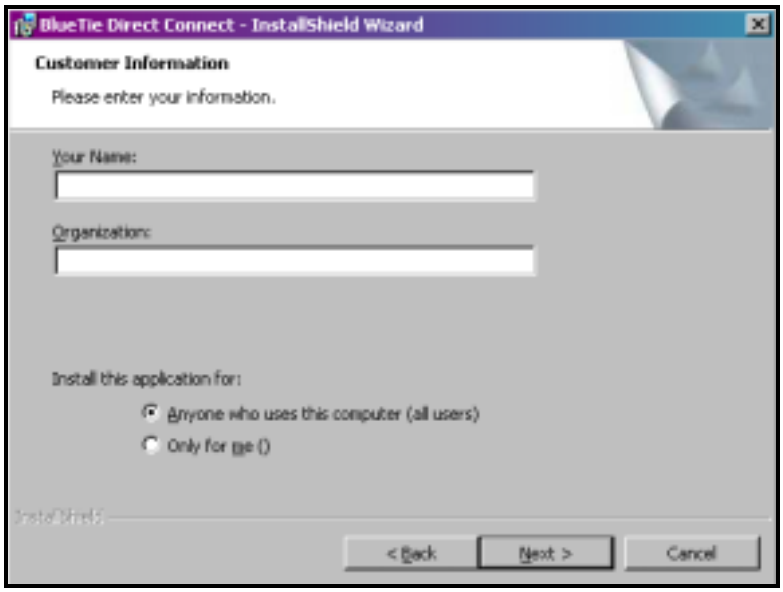
After the DirectConnect File is downloaded to the desired location on your machine, double click on the icon to begin the installation wizard. You will be greeted with a Welcome Screen. This screen will allow you to begin the installation of DirectConnect.


BlueTie Direct Connect - InstallShield Wizard
Welcome to the InstallShield Wizard for BlueTie Direct Connect
The InstallShield(R) Wizard will install BlueTie Direct Connect on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

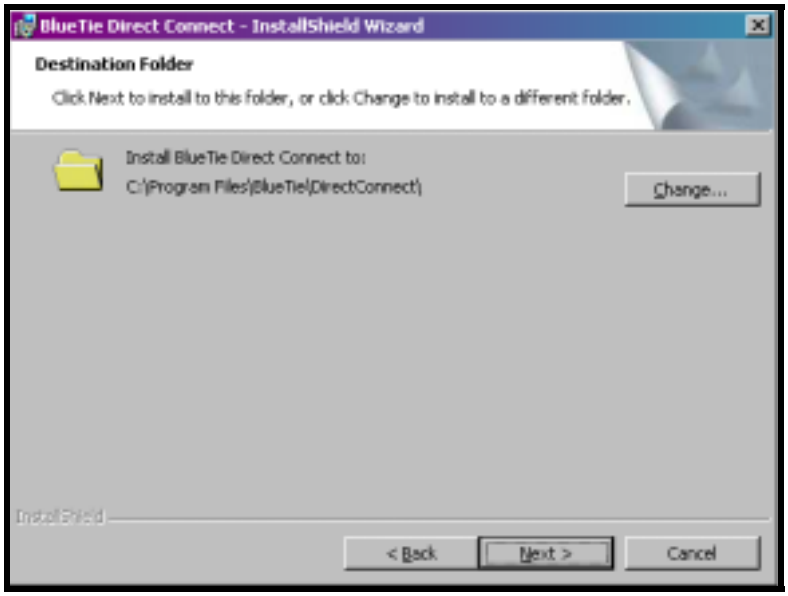
Click Next to continue. If you agree to the terms, click "I accept the terms in the license agreement".

BlueTie Direct Connect - InstallShield Wizard
License Agreement
Please read the following license agreement carefully.
BlueTie End-User License Agreement (EULA)
IMPORTANT -- READ CAREFULLY BEFORE USING THIS SOFTWARE:
Do not use the Software until you have carefully read the following Agreement. This Agreement sets forth the terms and conditions for licensing of the Software from BlueTie to you, and installing and using the Software indicates that you have read and understand this Agreement and accept its terms and conditions.
This End-User License Agreement for certain BlueTie Products ("Agreement") is a legal agreement between you (either an individual or an entity) and BlueTie, Inc. and its suppliers and licensors (collectively "BlueTie") for the BlueTie
I accept the terms in the license agreement
I do not accept the terms in the license agreement
InstallShield
< Back
Next >
Cancel

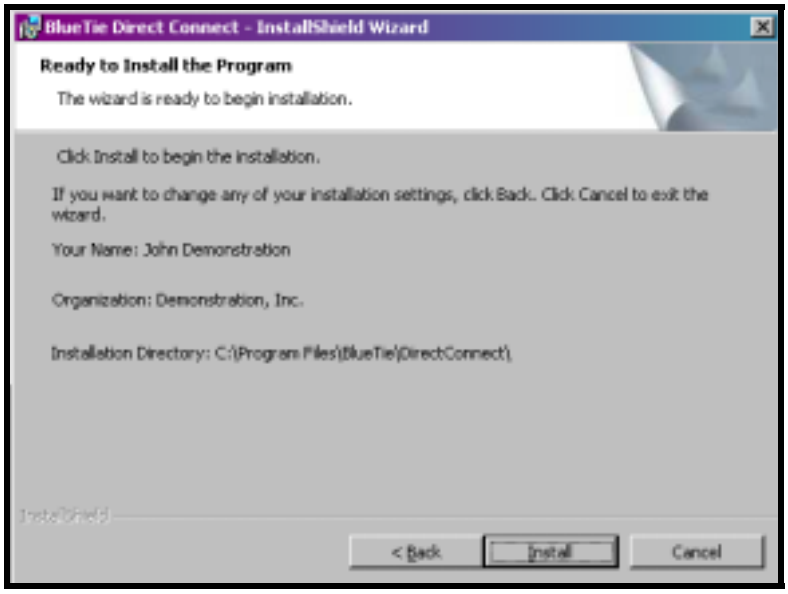
Next, you will be asked to enter in your full name and organization's name. In this screen you will also have the option to install the application for any person who uses your computer or reserve DirectConnect to be used only by you.



Next, select the location where you would like DirectConnect to be installed on your hard drive. The Location screen will allow you to choose where the files will be stored. Once you have chosen the location, installation of DirectConnect will begin.


BlueTie Direct Connect - InstallShield Wizard
Destination Folder
Click Next to install to this folder, or click Change to install to a different folder.
Install BlueTie Direct Connect to:
C:\Program Files\BlueTie\DirectConnect\
Change...
InstallShield
< Back
Next >
Cancel

Once the installation is complete, there will be a notification that the application has successfully installed.


BlueTie Direct Connect - InstallShield Wizard
Ready to Install the Program
The wizard is ready to begin installation.
Click Install to begin the installation.
If you want to change any of your installation settings, click Back. Click Cancel to exit the wizard.
Your Name: John Demonstration
Organization: Demonstration, Inc.
Installation Directory: C:\Program Files\BlueTie\DirectConnect\
InstallShield
< Back
Install
Cancel

First Time Transfer

Before you can begin using DirectConnect it is recommended that first you complete the setup wizard before attempting to sync. Double click on the DirectConnect icon on your desktop and the BlueTie DirectConnect Wizard will open.

DirectConnect Setup Wizard
Welcome to the BlueTie DirectConnect Setup Wizard.
This wizard will help you personalize settings for transferring Microsoft Outlook® data to your BlueTie account. To continue, click Next.
Help
Cancel
< Back
Next >
Finish

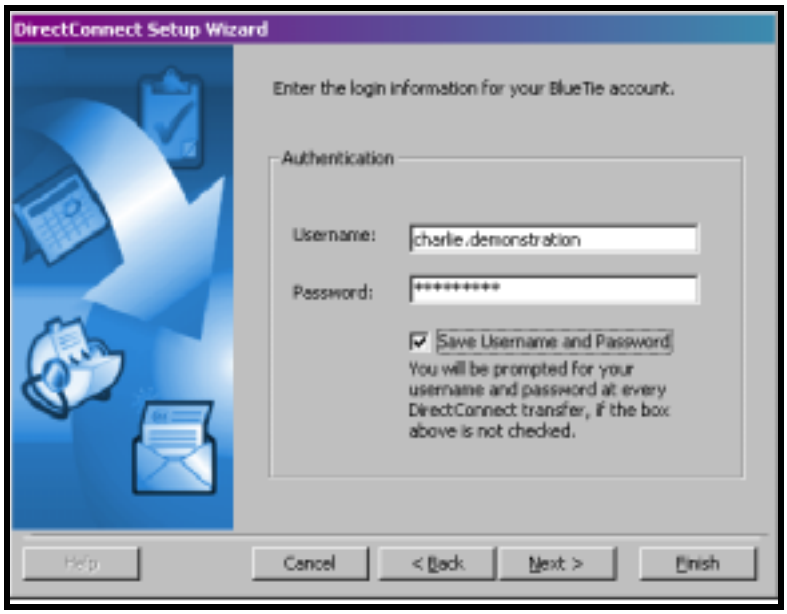
Setup Wizard

The following steps will be involved in the Setup Wizard:

1. You will be asked for your BlueTie username and password. It is recommended that the box for Save Username and Password be checked for your convenience so as not to be prompted each time you use the DirectConnect application. **Note:** If you change your password from the main website, this login will need to be manually updated.

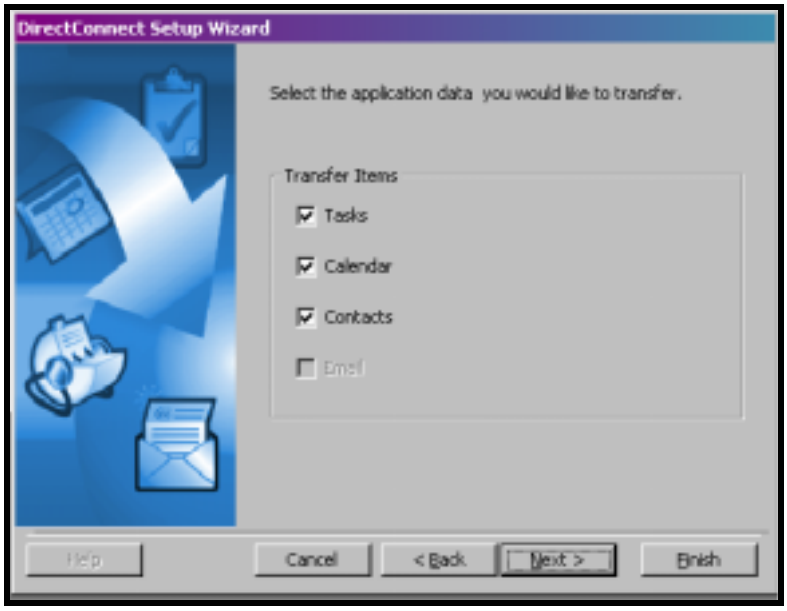
Authentication

Your username and password can be entered here with a choice of auto login at the start of the sync. If the auto-login option is not selected, you will be prompted for your username and password prior to the start of every sync.



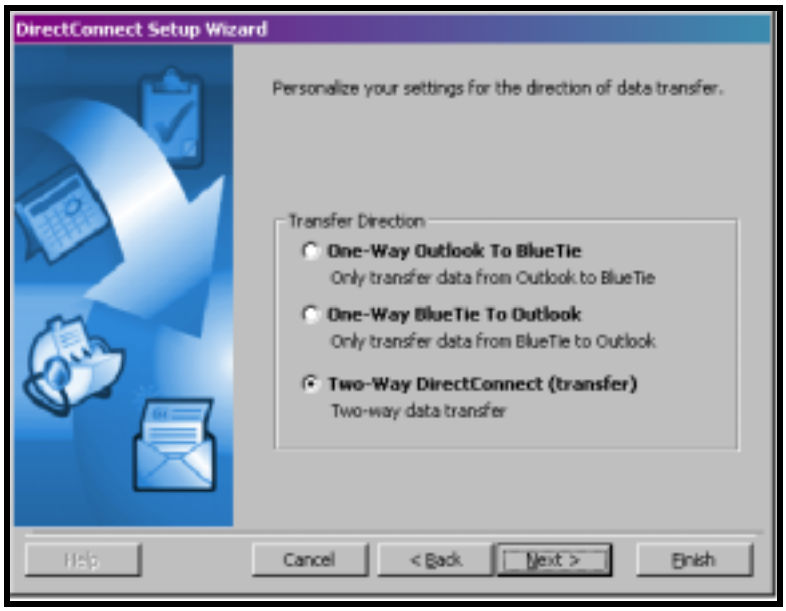
2. You will have the option of choosing which applications you would like to synchronize:

a. Task List
b. Calendar
c. Contact Manager
d. Email (will be available in a later DirectConnect release)



3. Next, you will be selecting the direction that you would like the information to be transferred. You will have three choices to choose from:

a. One-way Transfer from Outlook To BlueTie
b. One-way Transfer from BlueTie To Outlook
c. Two-way DirectConnect (Synchronize)



4. Next, you will be asked for to choose Conflict Resolutions options. The option chosen will determine how the software should handle conflicts (duplicate records in both systems)

Conflict Resolution Settings

A conflict is considered to be a modification made to the same field of the same item (contact, appointment/meeting, task or email) on both Outlook and BlueTie since the last DirectConnect.

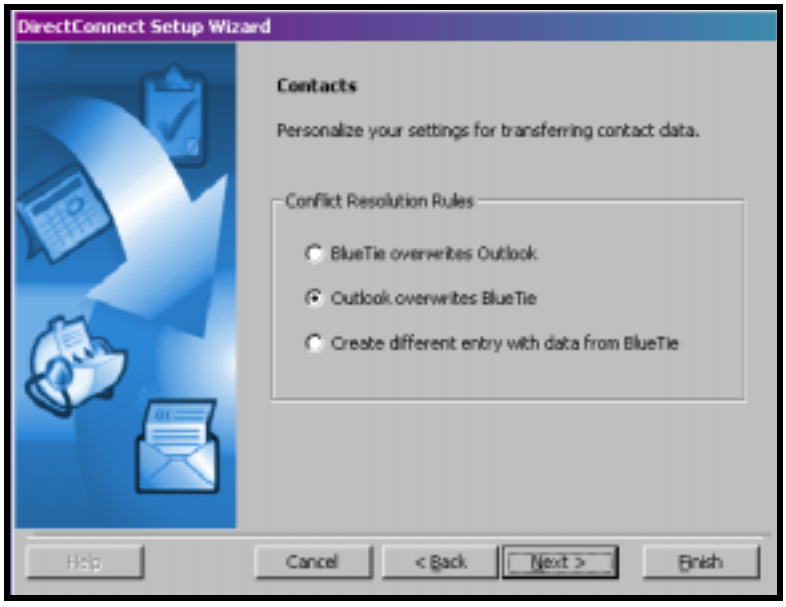
Three settings will be available:

- **BlueTie overwrites Outlook** - Data coming from BlueTie for the particular field of that particular item will overwrite Outlook data for the corresponding field of that item
- **Outlook overwrites BlueTie** - Data coming from Outlook for the particular field of that particular item will over write BlueTie data for the corresponding field of that item
- **Split items to preserve data**
    - Modified field will be compared for equality
    - If they are equal, no updated will be made
    - If they are different, new items will be created on Outlook and BlueTie and both versions of modified items will be saved into those items.

Contact Manager Settings

Conflict Resolution Rules:

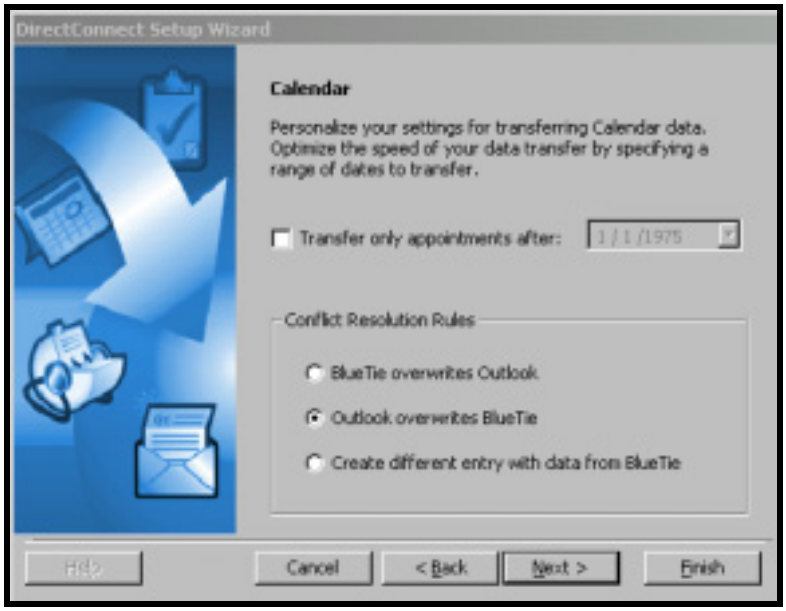
- **BlueTie overwrites Outlook** - if the same data (contact) is modified in both BlueTie and Outlook, the changes from BlueTie will overwrite the changes in Outlook.
- **Outlook overwrites BlueTie** - if the same data (contact) is modified in both BlueTie and Outlook, the data changes from Outlook will overwrite the data changes in BlueTie.
- **Create different entry with data from BlueTie** - if the same data (contact) is modified in both BlueTie and Outlook, a new contact (with the modifications made in BlueTie) will be added to Outlook.



Calendar Settings

The first option will allow you to choose to transfer only appointments occurring after a specified date. This option is useful if you no longer have the need for old appointments.

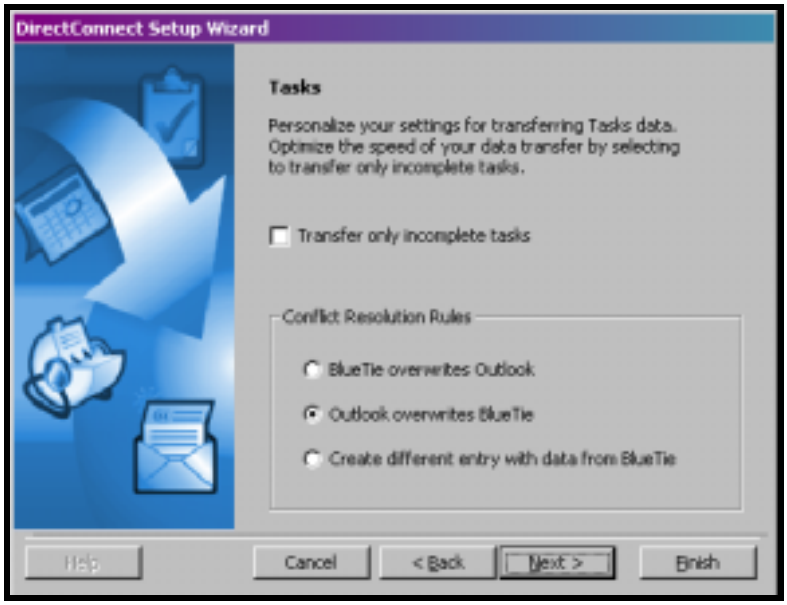
- **BlueTie overwrites Outlook**- if the same data (calendar) is modified in both BlueTie and Outlook, the data changes from BlueTie will overwrite the data changes in Outlook.
- **Outlook overwrites BlueTie**- if the same data (calendar) is modified in both BlueTie and Outlook, the data changes from Outlook will overwrite the data changes in BlueTie.
- **Create different entry with data from BlueTie** - if the same data (calendar) is modified in both BlueTie and Outlook, an appointment with the changes that were made in BlueTie will be added to Outlook.


DirectConnect Setup Wizard
Calendar
Personalize your settings for transferring Calendar data. Optimize the speed of your data transfer by specifying a range of dates to transfer.
Transfer only appointments after:
1/1/1975
Conflict Resolution Rules
BlueTie overwrites Outlook
Outlook overwrites BlueTie
Create different entry with data from BlueTie
Help
Cancel
< Back
Next >
Finish

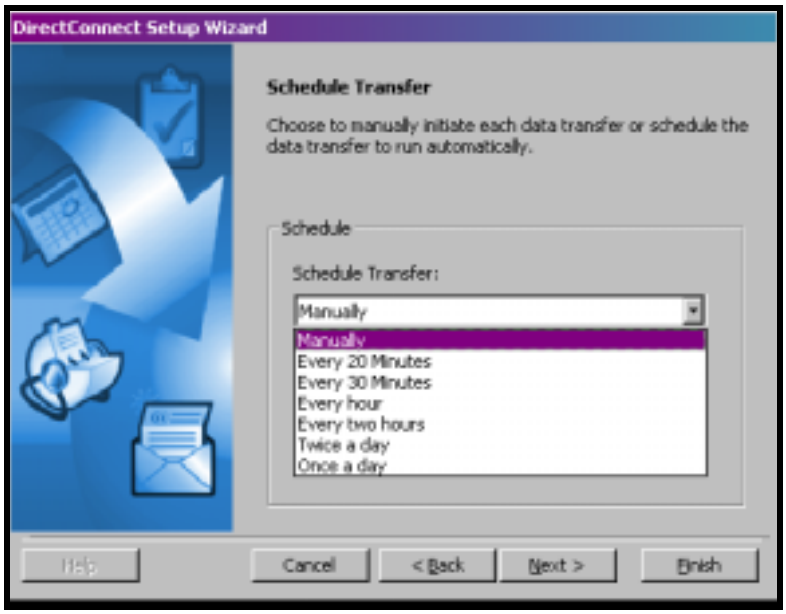
Task Settings

You are given the option to select transferring only incomplete tasks i.e. if a task has been completed or checked off, the task will not transfer.

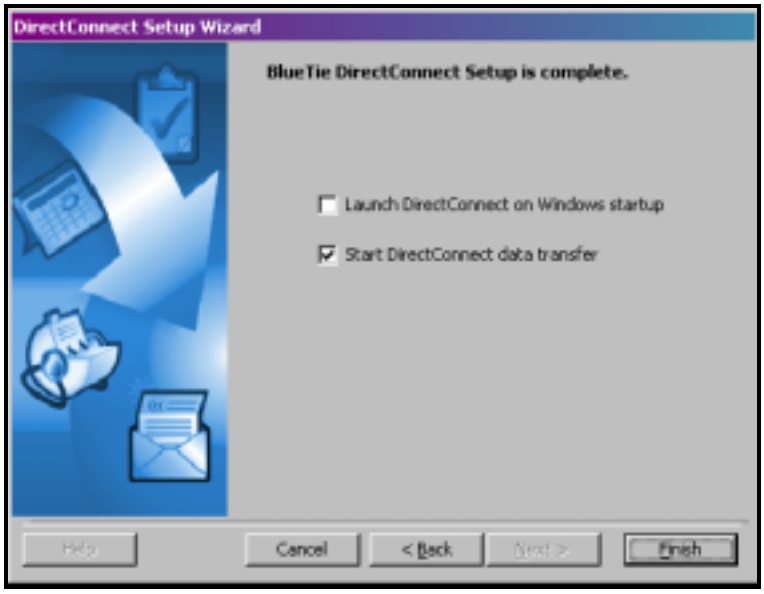
- **BlueTie overwrites Outlook**- if the same data (task) is modified in both BlueTie and Outlook, the data changes from BlueTie will overwrite the data changes in Outlook.
- **Outlook overwrites BlueTie**- if the same data (task) is modified in both BlueTie and Outlook, the data changes from Outlook will overwrite the data changes in BlueTie.
- **Create different entry with data from BlueTie**- if the same data (task) is modified in both BlueTie and Outlook, a task with the changes that were made in BlueTie will be added to Outlook.


DirectConnect Setup Wizard
Tasks
Personalize your settings for transferring Tasks data. Optimize the speed of your data transfer by selecting to transfer only incomplete tasks.
Transfer only incomplete tasks
Conflict Resolution Rules
BlueTie overwrites Outlook
Outlook overwrites BlueTie
Create different entry with data from BlueTie
Help
Cancel
< Back
Next >
Finish

5. The next screen will allow you to pick the synchronization interval with available choices of:
    a. Manual DirectConnect
        i. This will require you to manually synchronize every time you wish to update ` your information.
    b. Automatic DirectConnect
        i. Will be started automatically based on the following time intervals
            1. 20 minutes
            2. 30 minutes
            3. Every Hour
            4. Every 2 Hours
            5. Twice a day
            6. Once a day

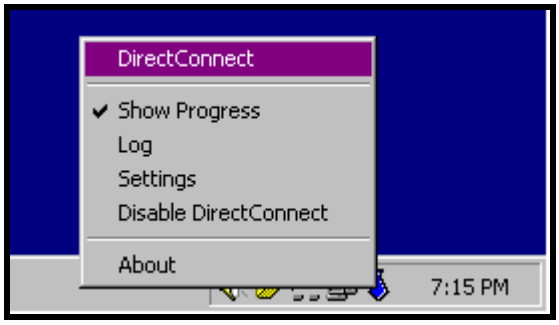


6. The final screen will allow you to launch the DirectConnect.



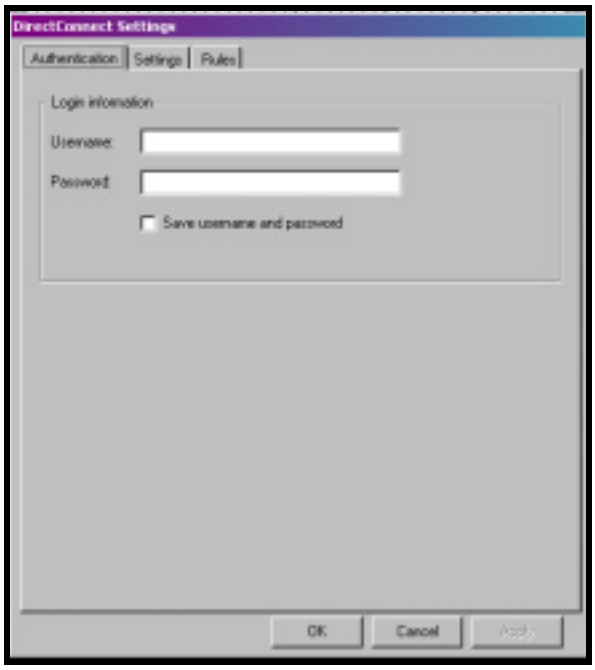
System Tray DirectConnect Settings

DirectConnect settings are available through the separate Setting Screen that you can access by right clicking on the DirectConnect Icon in the system tray (located at the bottom right of your computer by the Computer's clock). The screen will contain a number of tabs:



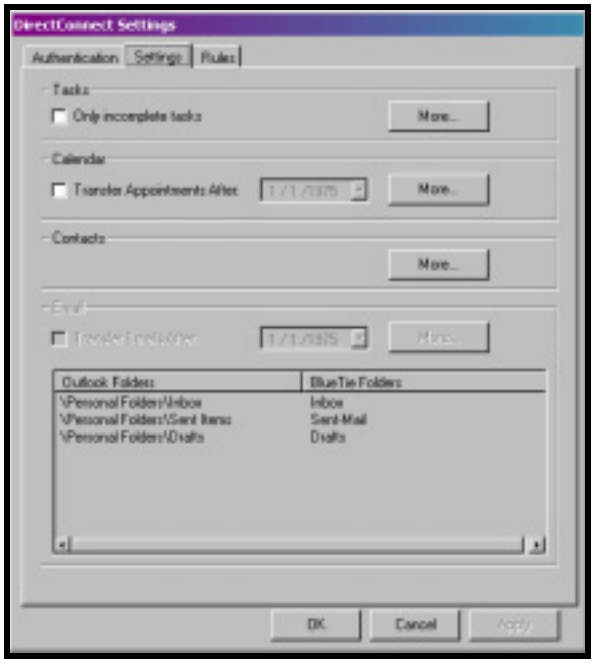
Authentication Tab

This will be where your can put your Login Information and choose whether to save the Username and Password.



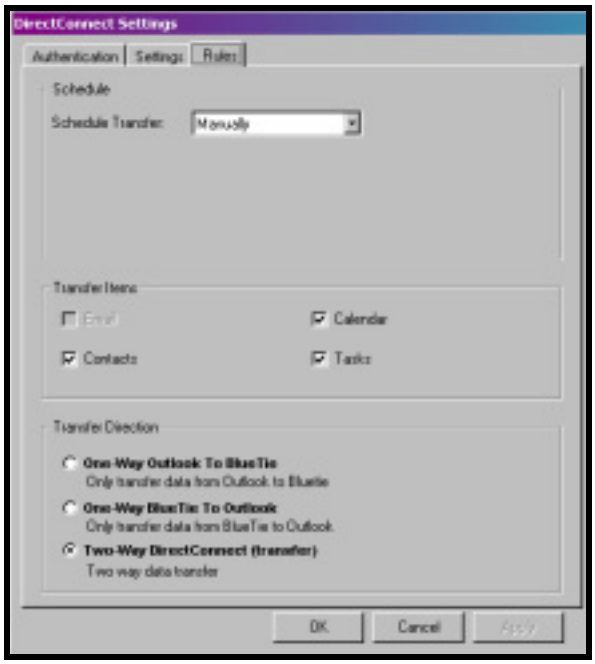
Settings Tab

You can modify the settings that were created during the initial setup for tasks, calendar, contacts, and eventually email.



Rules Tab

You can modify the frequency in which DirectConnect will synchronize, and what items will be synchronized (calendar, tasks, contacts, and eventually email), and also the transfer direction i.e. two- way DirectConnect, One-Way Outlook to BlueTie, and One-Way BlueTie to Outlook.



DirectConnect Updates

Updates to the software are done automatically. You will NOT prompted to pick the location or choose any action. The process will be entirely automated. If the DirectConnect process detects that there is an update available, it is uploaded and installed to your machine.

Outlook Client Updates

If the Outlook client has been updated, BlueTie's DirectConnect will automatically detect that an updated version has been installed. Changing the Outlook application will prompt you to update DirectConnect as well.

Field Mapping Information

Tasks

The following mapping will be used in tasks DirectConnect:

Outlook	BlueTie
Subject	Title * (240 char limit)
Notes	Description (1000 char limit)
Due Date	Due Date
Status	Status
Priority	Priority

*No other fields from Outlook or BlueTie will be processed at this point.

Limitations

Only tasks from 'Tasks' folder will be transferred with BlueTie in this version of DirectConnect.

Contacts

The following mapping will be used in contact manager application DirectConnect:

Outlook	BlueTie
Full Name	Display Name* (255 char limit)
Title	Title (255 char limit)
First Name	First Name (255 char limit)
Middle Name	Middle Name (255 char limit)
Last Name	Last Name (255 char limit)
Suffix	Suffix (255 char limit)
Nickname	Nickname (255 char limit)
Birthday	Birthday
Anniversary	Anniversary
Company	Company (255 char limit)
Job Title	Job Title (255 char limit)
E-mail	Email (255 char limit)
Spouse name	Spouse (255 char limit)
Web page address	Website (255 char limit)
E-mail 2	Alternate Email (255 char limit)
Business Street	Business Address line 1 (255 char limit)
Business Street	Business Address line 2
Business City	Business City (255 char limit)
Business State/Province	Business State/Province (255 char limit)
Business ZIP/Postal code	Business Zip/Postal code (255 char limit)
Business Country/Region	Business Country (255 char limit)
Home Street	Home Address line 1 (255 char limit)
Home Street	Home Address line 2
Home City	Home City (255 char limit)
Home State/Province	Home State/Province (255 char limit)
Home ZIP/Postal code	Home Zip/Postal code (255 char limit)
Home Country/Region	Home Country (255 char limit)
Business Phone	Business Phone (255 char limit)
Business Fax	Business Fax (255 char limit)
Assistant Phone	Assistant Phone (255 char limit)
Home Phone	Home Phone (255 char limit)
Home Fax	Home Fax (255 char limit)
Mobile Phone	Mobile Phone (255 char limit)

Other Phone	Other Phone (255 char limit)
Pager	Pager (255 char limit)
Notes	Notes (1000 char limit)
Assistant's name	Assistant's name (255 char limit)
Manager's name	Manager's name (255 char limit)
Department	Department (255 char limit)
Office	Office (255 char limit)
IM Address	IM Address (255 char limit)
Mailing Address	Mailing Address (flag)

No other non-user-defined field from Outlook or BlueTie will be transferred at this point. Contacts with empty File As field will NOT be transferred to BlueTie. If you modify previously transferred contact to an empty File As field, the modification will be ignored on BlueTie side.

Display Name / File As

Display Name settings on BlueTie will be matched to Outlook settings, plus BlueTie will have two additional options:

- Custom
- Last, First Middle
- First Middle Last
- Company
- Last, First Middle (Company)
- Company (Last, First Middle)
- Email Address (BlueTie only)
- Nickname (BlueTie only)

Limitations

Only contacts from the 'Contacts' folder will be transferred to BlueTie in this version of DirectConnect. All personal contacts from BlueTie will be transferred to the Contacts folder only.

Calendar

The following mappings will be used in Calendar DirectConnect:

Outlook	**BlueTie**
Subject	Title (255 char limit)
Start time	Start time
End time	End time

Notes	Description (1000 char limit)
Reminder	Reminder
Importance	Priority
Private	Personal
Recurrence	Repetition (matches Outlook)
Attendees	Meeting Attendees
Creation Time	Scheduled At

The following items will be transferred:

- Appointments
- Meetings (1 or more attendees)
- All-day events

Birthdays and anniversaries will not be transferred as Outlook takes care of them based on the data in Contact Manager.

Holidays will not be transferred as Outlook keeps its own holiday's database.

Reminders

Reminders will NOT be transferred with BlueTie at this point. However, they will be stored locally on your machine and you will still be able to use Outlook's reminders feature as long as the Outlook client is open.

Additional Information

Contact a BlueTie representative to discuss how BlueTie*'s* messaging and collaboration solutions can help you make the most of your customers.

Sales and General Information

Toll-Free (in US): 1.800.BLUE.TIE (258-3843)
Phone (outside US): 1.585.244.5000
Fax: 1.585.244.5005
Website: www.bluetie.com

Customer Service and Technical Support

Toll-Free (in US): 1.800.BLUE.TIE (258-3843) Option 3
Phone (outside US): 1.585.244.5000 Option 3
Fax: 1.585.244.5005
Website: www.bluetie.com